

EXECUTIVE SUMMARY

Opinion Dynamics Corporation interviewed 500 people of Hispanic descent. The interviews were conducted in six markets: Miami, Atlanta, Boston, Houston, Chicago, and Los Angeles. The interviews, which lasted an average of 18 minutes in length, covered a range of topics related to seafood consumption. The sample consisted of people with Hispanic surnames who were selected at random from each market. Respondents were then screened to ensure that they were of Hispanic descent. The main purposes of the survey were to understand Hispanic seafood preferences and generate a strategy for increasing sales of Florida seafood products.

While the results of the survey indicate that seafood is not an everyday food for most Hispanics, there does appear to be a potential to increase seafood sales. In general, respondents' opinions toward seafood were very positive—most of the study population thinks seafood has a good taste, is healthy, and is easy to prepare. The only clear barriers to purchasing more seafood are: 1) a perception that it is not always affordable; and 2) a tendency to think of seafood as a special occasion food (holidays, Friday, parties, etc.).

Given the positive attitudes many Hispanics already hold toward seafood, we believe that an effective marketing campaign would do the following:

- Change the perception of seafood from being a food served mostly on special occasions to a staple similar to beef and chicken
- Address the perception that seafood is too expensive to be eaten regularly
- Remind people of the health benefits and ease of preparation of seafood

Other findings are as follows:

Current Purchasing Behavior

Reported home consumption of seafood illustrates that seafood is clearly not a staple of most Hispanics diets. Very few (16%) in the study population eat seafood more than once per week, while the majority (58%) eats seafood between one and four times a month. Further illustrating that many do not think of seafood as an every day food, nearly half of the study population associates seafood with holidays or other special occasions.

When Hispanics do purchase seafood, they are likely to buy it in a grocery store (76%) as opposed to at a seafood market (20%). Respondents reported preparing seafood in a variety of different ways. Frying was the most frequently reported method of preparing seafood, followed by baking, broiling and stewing.

Knowledge of Seafood

Much of study population lacks knowledge about seafood. When respondents were asked to rate the taste of specific types of seafood, many were unable to do so because they hadn't tried various types. Over 40% of survey respondents had never tried eleven of the seventeen types of seafood we tested. As another indicator of low knowledge levels, very few Hispanics (19%) say they are familiar with the seasonality of the types of seafood that they like to eat. This lack of knowledge regarding different types of seafood and seasonality is especially prevalent among younger respondents.

When asked to name seafood they have purchased, many could name only shrimp, lobster, and other shellfish; most were unable to name any finfish they have purchased. While it is certainly possible that Hispanics are eating more shellfish than other types of seafood, what seems more likely is that they remember the shellfish they eat, while they do not always know or do not remember the names of the types of finfish they eat. Once again, this may indicate a lack of knowledge of seafood in general.

Messages

The survey tested a series of eight messages designed to increase seafood sales. The most effective messages dealt with the health benefits of seafood. Nearly two-thirds (60%) of respondents said they were much more likely to purchase seafood after hearing that *“seafood is not only low fat but low calorie and is high in vitamins, making it an important part of a healthy diet.”* However, we have seen in other food related surveys that people often overestimate the effectiveness of health messages – while they like to think of themselves as responding to the health messages, the actual change in purchasing behavior is often less than expected.

Messages dealing with the ease of preparation of seafood were also well received—43% said they were much more likely to purchase seafood after hearing that *“seafood can be prepared anyway you like—baked, broiled, fried, or steamed.”*

Marketing Ideas

We also tested several promotional ideas. These promotions included providing recipe cards where seafood is sold, labeling seafood with the location where it was caught, posting nutritional information where seafood is sold and including inserts into grocery fliers with information about the seasonality of various seafood types. None of these promotions were met with overwhelming enthusiasm and it is unlikely that on their own they could significantly boost seafood sales. They could, however, be an effective component of a larger campaign.

Other Issues

“Florida seafood” means nothing to most Hispanics. Almost no one knows anything specific about Florida seafood and a majority (59%) says that knowing seafood was Florida caught would not make them any more likely to purchase it. There does, however, appear to be some potential to market seafood as being from a region known for high quality seafood—a majority (59%) says they would be more likely to purchase seafood if they were informed about which regions were known for high quality seafood, and if seafood from those regions was available to them. In effect, this means that “Florida seafood” can be a selling point only if consumers are first convinced that Florida has a reputation for excellent seafood.

Hispanics appear to be far less concerned with whether seafood is domestic or imported than the overall American population. Most of the study population (53%) does not have a preference between imported and domestic seafood; past research has shown that a majority of Americans will almost always prefer a domestic product to an imported one.

While Hispanics may not be concerned with the country of origin of their seafood, they do have a strong preference for seafood caught in the wild as opposed to farm raised.

When it comes to purchasing seafood to cook at home, Hispanics exhibit a strong preference to purchase seafood plain as opposed to pre-marinated or pre-cooked. They also exhibit a strong preference for fresh verses frozen seafood. To a lesser degree, seafood that is not prepackaged is preferred to seafood that is prepackaged.

Finally, a majority of Hispanics expressed a willingness to try new types of seafood. Thus while many Hispanics think only of shrimp and a few other select species, they are willing to go in new directions in their purchasing behavior.

METHODOLOGY

The sample for this survey was generated by gathering lists of residents with Hispanic surnames in the following six markets: Atlanta, Boston, Chicago, Houston, Los Angeles and Miami. Survey respondents were randomly called from these lists. Respondents were further screened during the interview to ensure they were of Hispanic descent.

Interviews were conducted among 500 randomly selected Hispanics during the evening and weekend hours between May 22 and June 1, 2002. All interviews were conducted from a central, supervised location by trained bilingual interviews. Interviews were conducted in the respondent's language of choice (English or Spanish). All interviews were conducted using a Computer-Assisted Telephone Interviewing (CATI) system.

An average interview required 18 minutes to complete.

About the Sample

The breakdown of completed interviews by market is as follows:

➤ Atlanta	75
➤ Boston	75
➤ Chicago	75
➤ Houston	75
➤ Los Angeles	100
➤ Miami	100

Respondents in the Atlanta, Chicago, Houston and Los Angeles markets tended to be of Mexican decent. Respondents in the Miami market were most likely to be of Cuban decent, with others tracing their origins to a Central American country besides Mexico or South America. The Boston sample was the most heterogeneous with respondents from Central American countries besides Mexico, Caribbean countries besides Cuba, Puerto Rico and South America.

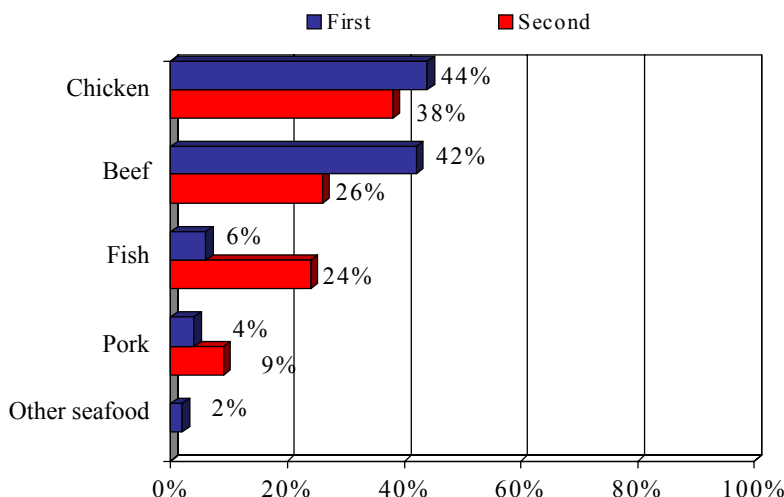
Less than half (42%) of the respondents spoke English fairly well, while 58% didn't speak English at all or spoke it with difficulty. Nearly all (96%) of the respondents spoke Spanish at least fairly well—91% were fluent in Spanish.

Education and income levels are significantly lower for study population than the overall American population. Median household income for survey respondents was approximately \$20,000. According to 2000 census data, median household income for all American households was approximately \$41,000. A third (33%) of respondents did not finish high school, compared to 20% of all Americans and just 15% of respondents graduated college, compared to 25% of all Americans.

I. CURRENT PURCHASING AND CONSUMPTION HABITS

The survey began by asking respondents whether they eat chicken, beef, fish, pork, or other seafood most frequently. They were then asked to give the food eaten the next most frequently. As the chart below illustrates, chicken and beef are eaten more frequently than the other types of food listed. Fish is the primary dietary meat for just 8% of the study population, but listed second by nearly one-quarter (24%) of the population. Few Hispanics said they eat pork more frequently than other types of meat.

Which do you purchase most frequently?



Q5, 7

- Seafood is more likely to be the primary or secondary meat of Hispanics in the Boston (36%), Los Angeles (36%) and Miami (35%) markets than in the other markets.
- Groups that are more likely to purchase seafood as a primary or secondary meat include those over 53 years old (43%), women (37%) and those of Cuban decent (43%).

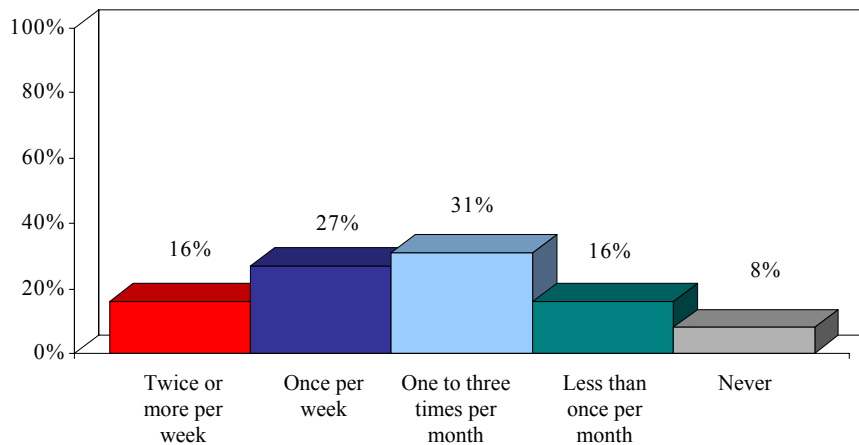
Respondents were asked why they purchased their meat of choice most frequently. Taste is the reason for nearly half (47%) of the study population. Other reasons for purchasing a certain type of meat frequently include health benefits (17%), tradition (13%), variety of cooking options (5%) and price (4%). People who purchase chicken in particular are likely to mention health reasons as the most important factor in choosing a particular type of meat. This indicates that there are a segment of the Hispanic population who is health conscious and makes purchasing decisions based on this factor.

The small number of respondents who purchase seafood more frequently than other meats does not allow for a meaningful analysis of reasons for doing so.

Frequency of Purchasing Seafood

For many people, seafood is a food eaten on special occasions, rather than being a staple of their diet. Less than half (43%) of the study population prepares seafood at home at least once a week, despite the fact that most respondents gave seafood high ratings for taste. However, it should be noted that most people buy seafood at least occasionally; only 8% say they never prepare seafood at home.

How often do you prepare seafood (both shellfish and other types of fish) at home?

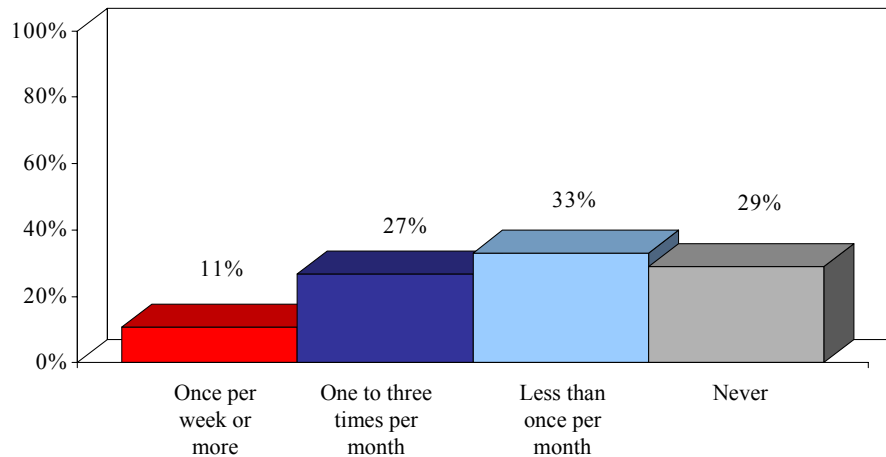


Q8

- Hispanics in the Atlanta (53%) market are more likely than Hispanics in other markets to prepare seafood at home once a week or more, followed by those in the Boston (47%), Los Angeles (44%), Houston (41%), Miami (39%) and Chicago (36%) markets.
- Hispanics over the age of 40 are more likely to purchase seafood at least once per week than are Hispanics under the age of 40; 51.5% of Hispanics over the age of 40 purchase seafood at least once per week, compared with 39% of Hispanics under the age of 40.
- Women are more likely than men to report preparing seafood at home at least once per month (48% to 36%).
- There are no statistically significant differences between Hispanics based on age, education, or whether or not there are children living in the household.

The study population is less likely to purchase seafood at restaurants than to prepare it at home. Nearly one-third (29%) of the population never purchases seafood in a restaurant. As the below chart illustrates, only 11% of the population purchases seafood in restaurants on a weekly basis, 27% purchases seafood in a restaurant on a monthly basis and 33% purchases seafood in a restaurant less than once per month.

How frequently do you eat seafood purchased in a restaurant?



Q11

Reasons for not Purchasing More Seafood

Respondents who prepare seafood at home once per week or less were asked why they do not prepare seafood more frequently. Among those not eating seafood frequently, 32% do not like the taste, 32% say the cost is prohibitive, 9% feel seafood is difficult to cook, 7% never think to buy seafood, and 7% say it is not always available. Note that a majority of Hispanics mentions reasons other than taste, indicating that they may be convinced to eat more seafood, given the right marketing campaign. These people may be considered the target market, as it is easier to persuade consumers to purchase foods that they already like the taste, but face other obstacles. However, these responses also show cost to be a factor that will be difficult to overcome.

Reasons for Not Purchasing more Seafood	TOTAL
(Cost/Too Expensive)	32%
(Don't like Taste/Like other foods better)	32
(Too difficult to cook)	9
(Not always available)	7
(Never think of it)	7

- Hispanics in the Miami market (48%) are particularly likely to say they do not eat seafood more frequently due to its cost.
- Those in the Chicago (14%) and Miami (12%) markets are relatively more likely than people in other markets to say that they simply never think of it. These people are the easiest to reach in a marketing campaign.
- Hispanics in the Los Angeles market are the most likely to cite a preference for the taste of other foods (45%).
- Younger Hispanics (aged 18 to 26) tended to cite a preference for other foods, while those over the age of 40 were more likely to cite the cost, rather than the taste.
- Hispanics of all income levels are relatively equally likely to cite the cost of seafood as a prohibitive factor; even those making over \$50,000 per year often cited cost as a factor.

The Target Population

In total, over half (52%) of the study population prepare seafood once a week or less, and do so for reasons such as price, the perception that it is difficult to cook or that they never think to buy seafood—reasons other than an inherent dislike for the taste of seafood. As mentioned above, people meeting these criteria are the most likely to increase seafood consumption given an effective marketing campaign. For the remainder of the report, this 52% will be referred to as the target population.

The target population is represented in roughly equal proportions in all six markets. Other demographic tendencies of this group include the following:

- Under the age of 53
- High school education or less
- Most of them either have difficulty speaking English or do not speak English at all.

Association with a Holiday

Nearly half (46%) of the study population associates seafood with a particular holiday or time of week or year. This reinforces the need for a marketing campaign to convince people to think of seafood as a staple, rather than a food to be eaten only on special occasions.

Among those who do associate seafood with a particular holiday or time of the week or year, we asked them to name that particular time – respondents were not read a list of options. As shown below, among those who associated seafood with a particular time, Easter (47%) and the surrounding holiday period is the most frequent association; no other holiday was frequently mentioned. Some people associate seafood with weekends (13%), birthdays (10%), parties in general (8%) and Fridays (6%). Christmas was rarely mentioned.

Which holiday or time of the week or year?

Easter/Good Friday/Holy week/Lent	47%
Weekends	13
Birthdays	10
Parties	8
Friday	6
Sunday	3
Christmas	2
Mother's Day	2

Q66

Hispanics of all ages and backgrounds are relatively equally likely to associate seafood with a particular holiday or time of the week or year.

Types of Seafood Purchased Recently

We asked respondents to name the types of seafood they have purchased in the past month. The question was open-ended - respondents were not read a list of possibilities. As shown below, Hispanics report eating shrimp much more frequently than any other type of seafood. Fully 75% of the study population has purchased shrimp in the last month. Lobster is the only other seafood purchased by more than 10% of the overall population in the past month.

What kind of seafood have you bought at the grocery store, restaurant or seafood market in the past month?

Shrimp	75%
Lobster	12
Salmon	9
Crab	6
Red Snapper	5
Octopus	4
Grouper	3
Tilapia	3

Q12

There are several factors that may have lead Hispanics to mention shellfish by name more frequently than finfish. One reason could be that Hispanics truly do eat much more shellfish than other types of seafood. However, it is also possible, and perhaps even likely, that many Hispanics simply have better recall for types of shellfish than types of finfish. For example, it is possible that many in the study population will have eaten a finfish in the last month and not known its name or do not any longer remember its name. Another possibility is that many in the study population may interpret the word seafood to be referring to shellfish exclusively, despite the fact that we explicitly defined our terms in the beginning of the survey.

Shrimp was frequently mentioned by respondents in each of the six markets. However, there is some variation in purchasing habits beyond shrimp. In the Atlanta, Chicago and Houston markets, shrimp is the only single seafood mentioned by more than 7% of the population in the past month. As shown below, purchasing habits are more varied in the Boston, Los Angeles and Miami markets.

Boston

- Shrimp 71%
- Lobster 25%
- Salmon 12%
- Crab 11%

Miami

- Shrimp 67%
- Lobster 20%
- Red Snapper 14%
- Crab 13%
- Salmon 10%

Los Angeles

- Shrimp 74%
- Salmon 15%
- Lobster 11%

Seafood Preparation

We asked respondents how they most frequently prepare seafood at home. Once again, the question was open ended; respondents were not read a list of responses.

We found that the study population prepares seafood in a variety of different ways. Frying (34%) is the most common way of preparing seafood, followed by baking (20%), broiling (17%) and stewing (13%). A smaller number prepares seafood by steaming, sautéing or in enchiladas. Grilling was almost never mentioned.

How do you (most frequently) prepare seafood at home?

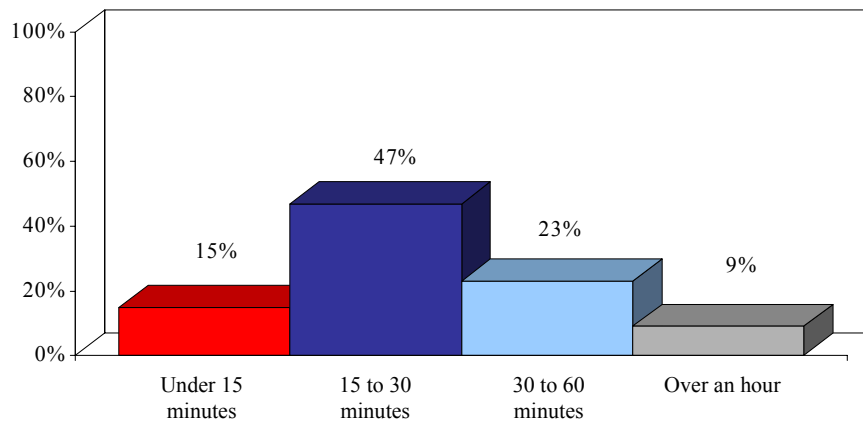
Fried	34%
Baked	20
Broiled	17
Soup/Caldo/Stew	13
Cocktail sauce	2
Al vapor-steamed	2
With salsa	2

Q38

- Frying is more popular in Houston (44%) and Boston (40%) and less popular in Miami (25%). Baking is the most popular way of preparing seafood in Miami (30%).
- Mexicans and Hispanics from other Central American countries are more likely to report frying their fish than Hispanics from other areas. Hispanics from Cuba, Puerto Rico, South America, and other Caribbean areas are more likely to bake their seafood than prepare it any other way.
- One-fifth of Hispanics of Mexican descent prepare the fish in soup or stews, a practice that is almost non-existent among Hispanics from Puerto Rico, Cuba, and South America in particular.
- Younger Hispanics are relatively likely to fry fish; those over the age of 53 are more likely to bake fish than they are to fry it.
- Hispanics of high educational and income levels are more likely to bake fish than fry it; those at the lower end of the socioeconomic scale are more likely to fry it.

Nearly two-thirds (62%) of the study population report spending under thirty minutes to prepare seafood dishes. 23% say they take between thirty and sixty minutes to prepare seafood dishes and 9% take over an hour.

How long (on average) do you usually take to prepare seafood dishes?



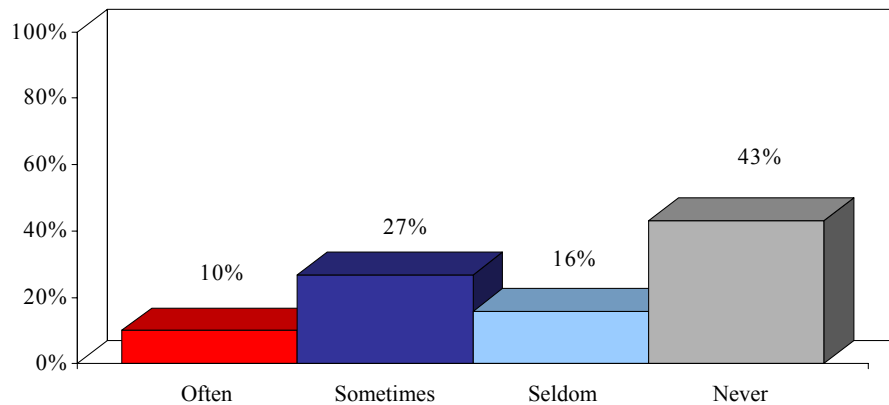
Q39

Respondents were asked what seasonings they typically use when cooking seafood. Most respondents mentioned standard seafood seasonings including garlic, salt, pepper, lemon, onion, tomato and butter. A significant number of respondents mentioned Goya products by name. A smaller number of respondents reported using hot sauce, pickles and ketchup for seafood seasonings. Other specific seasonings were rarely mentioned.

The Use of Recipes

Most (59%) of the study population seldom or never uses recipes in cooking. Just 10% use recipes often and 27% sometimes use recipes. Of course, it is possible that many people use the recipes that they learned years ago; they simply do not use new recipes found in books and other sources.

How often do you use recipes when cooking?



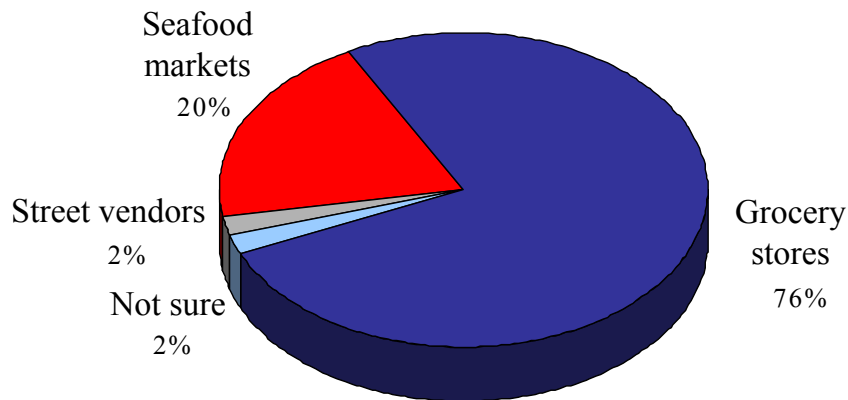
Q67

Hispanics earning over \$50,000 per year, or who have college degrees are more likely to use recipes than other Hispanics. However, the majority of Hispanics make less \$50,000 per year, and the majority do not have a college degree. Even among college graduates, few claim to use recipes on a regular basis.

Grocery Stores versus Seafood Markets

Grocery stores are by far the most common place for purchasing seafood to be prepared at home—76% of those who prepare seafood at home usually purchase it at a grocery store. Twenty percent of those who buy seafood usually purchase it at a seafood market.

Where do you usually purchase seafood that you prepare at home?



Q10

Responses to this question were strongly correlated with specific markets. While a majority of Hispanics shop in grocery stores in all of the markets, a substantial minority of Hispanics Boston (31%), Los Angeles (25%) and Miami (21%) shop at seafood markets. Few Hispanics in Chicago or Houston shop at seafood markets – it is likely that there are simply less seafood markets in these markets than in Boston, Los Angeles, or Miami.

II. ATTITUDES AND PREFERENCES TOWARDS SEAFOOD

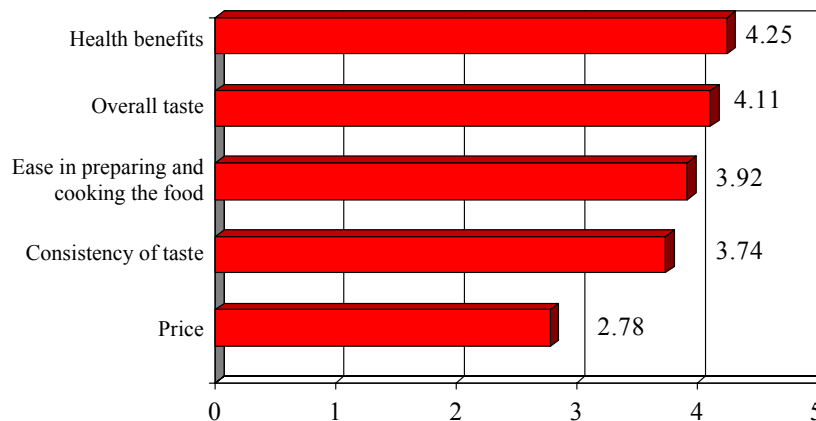
In order to gauge the study population's general perceptions of seafood, we asked respondents to rate seafood on five attributes. Respondents were asked to rate attributes of seafood from "1" meaning poor, to "5" meaning excellent, compared to other types of food. The mean score for each attribute is presented in the below chart. A score above three indicates that seafood is viewed favorably on that attribute, while a score below three indicates it is viewed unfavorably on that attribute.

In general, the study population believes seafood tastes good, is healthy, and is easy to prepare:

- 78% of respondents rate seafood as a "4" or "5" in terms of health benefits, with an average rating of 4.25.
- 72% of respondents rate the taste of seafood as a "4" or "5", with an average rating of 4.11.
- 67% of respondents rate the ease in preparing and cooking the food as a "4" or "5", with an average rating of 3.92

There is a perception, however, that seafood is an expensive food. Only 30% of Hispanics rate seafood as a "4" or "5" on this attribute, with an average rating of only 2.78.

Please tell me how you would rate seafood relative to other foods on a scale of one to five (1=poor, 5=excellent) on each of these attributes.*



Q16-20 *Mean shown

- Hispanics in the Miami market view seafood as more of a high-end food than those in other markets. Compared to the other markets, Miami rates seafood highest on taste (4.32) and health benefits (4.47), but lowest on price (2.31).
- Older Hispanics rate seafood higher on taste than their younger counterparts. Hispanics between the ages of 18 to 26 rate seafood substantially lower for taste than do Hispanics in any other age group.
- Similarly, the older the respondent, the more likely they are to rate seafood highly for ease of preparation.
- There are no differences in perceptions toward seafood based on income, gender, or other demographic factors.

Rating Types of Seafood

Respondents were asked if they had tried fifteen different types of seafood and, if they had tried a type, if they liked the taste. For analytical reasons, the fish have been grouped into five categories.

The first category includes seafood types that most people in the study population have tried and like.

- **Shrimp** has been tried by nearly everyone in the study population. 90% of the population likes shrimp, 7% dislikes it and just 2% has not tried it. These numbers do not vary by market.
- **Lobster** is liked by 68% of the population, disliked by 13% and has not been tried by 19%. Over one-quarter of the Los Angeles (27%), Chicago (28%) and Houston (31%) markets have not tried lobster.
- **Stone crab** is liked by 56% of the population, disliked by 19% and has not been tried by 25%. Surprisingly, a majority of Hispanics in each of the markets report having tried stone crab. It is possible that some Hispanics in other markets are thinking of other types of crab; nevertheless, it is a very popular type of seafood. Hispanics in the Houston (40%) and Los Angeles (42%) markets are more likely to have never tried stone crab than those in other markets.

	Like	Dislike	Never Tried
Shrimp	90%	7%	2%
Lobster	68%	13%	19%
Stone Crab	56%	19%	25%

The following four types of seafood types are the most likely to benefit from promotion. These types of seafood have been tried by less than 60% of the population, but those who try them generally like them. Types of seafood are listed below in order of their like to dislike ratio among those who have tried them.

- **Snapper** is liked by six people for every one that dislikes it. 53% of the population has tried snapper. Exposure to snapper varies drastically by market—nearly all Hispanics in the Miami market (98%) have tried snapper while far fewer Hispanics in Atlanta (28%), Chicago (34%), Houston (37%), Boston (54%) and Los Angeles (58%) have tried snapper.
- **Mahi-Mahi**'s like to dislike ratio is nearly 4-to-1 among those who have tried it—43% of the study population has tried Mahi-Mahi. Mahi-Mahi has been tried by many more in Miami (67%) than in the other five markets.
- **Grouper** is liked by three people for every one that dislikes it—just 33% of the population has tried grouper. Again, those in the Miami market are much more likely to have tried grouper (91%).
- **Tilapia** is liked by three people for every one that dislikes it—52% of the population has tried tilapia. Those in the Miami market (72%) are the most likely to have tried this fish, while those in the Chicago market (33%) are the least likely to have tried tilapia.

	Like	Dislike	Never Tried
Snapper	45%	8%	44%
Mahi-Mahi	34	9	54
Grouper	25	8	62
Tilapia	39	13	44

Less than 60% of the study population has tried the following four types of seafood. Even among people who have tried each of these fish, a substantial percentage dislikes it, making them more questionable as fish to promote.

- **Flounder** has approximately a 2-to-1 like to dislike ratio—26% of the population has tried flounder. Exposure to flounder does not vary substantially by market.
- **Mullet** is liked by a 2-to-1 ratio—57% of the population has not tried mullet. The Miami market (66%) is most likely to have tried mullet and the Atlanta market (48%) is the least likely.
- **Yellow fin tuna** is liked by less than two people for every one that dislikes it—47% of the study population has tried yellow fin tuna. Yellow fin tuna has been tried by the most people in the Miami market (60%) and by the least in the Boston market (37%).
- **Scallops** have a like to dislike ration of less than 2-to-1—57% of the population has not tried scallops. Scallops have been tried by more people in the Miami (54%) and Boston (51%) markets.

	Like	Dislike	Never Tried
Flounder	18%	8%	69%
Mullet	38	19	42
Yellow fin tuna	31	16	49
Scallops	25	14	57

Clams and oysters are the most controversial types of seafood. Over two-thirds of the study population has tried clams and oysters, but they are divided on their opinions of each.

- **Oysters** are just as likely to be disliked as liked—33% of the population say they like oysters, while 32% say they dislike oysters. Those in the Miami (82%) and Boston (78%) markets are the most likely to have tried oysters.
- **Clams** are slightly more likely to be liked than disliked, but over one-quarter (28%) of the population say they dislike clams. Those in the Miami (84%) and Boston (83%) markets are the most likely to have tried clams and those in the Houston (39%) market are the least likely.

	Like	Dislike	Never Tried
Oysters	33%	32%	35%
Clams	43	28	29

Less than half of the study population has tried shark and mackerel. Many of those Hispanics who have tried shark and mackerel report disliking the fish.

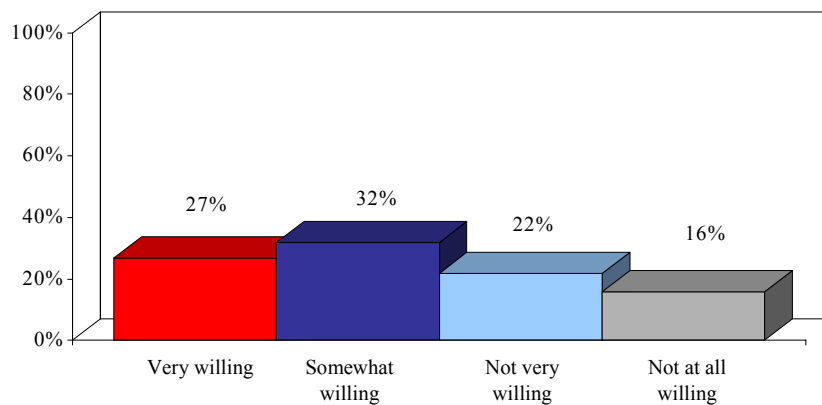
- **Shark** has been tried by less than half (40%) of the study population and those who have tried shark are more likely to dislike it than like it.
- **Mackerel** is nearly as likely to be disliked as liked. Only 34% of the population has tried Mackerel.

	Like	Dislike	Never Tried
Shark	17%	23%	58%
Mackerel	19	15	64

Willingness to Try New Types of Seafood

A majority (59%) of the study population is willing to try new types of seafood they have not eaten before—27% of is very willing to try types of seafood, 32% is somewhat willing.

How willing would you be to try new types of seafood that you have not eaten before?



Q37

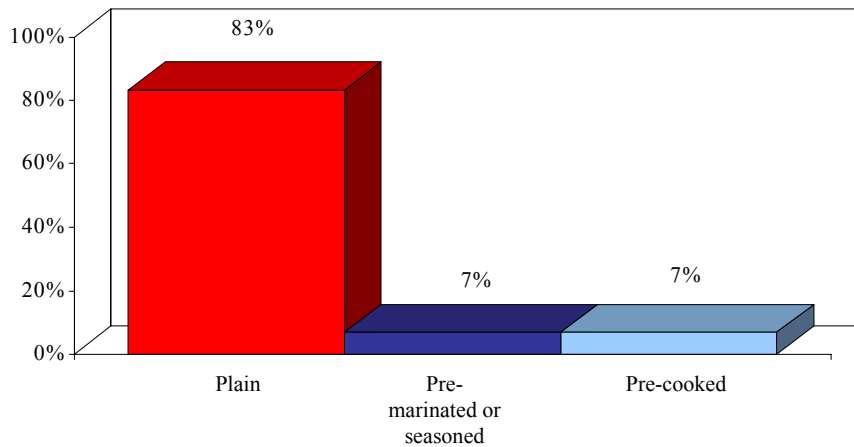
- Those in the Atlanta (69%) and Boston (67%) markets are the most likely to be very or somewhat willing to try new types of seafood, while those in Chicago (48%) are the least likely.
- Those who currently eat seafood less than once a month are less likely to try new types than those currently eating seafood at least once a month—49% compared to 64%.
- Younger people are more likely than older people to be willing to try new types of seafood.

Purchasing Preferences

Simplicity is important for most Hispanics when it comes to purchasing seafood. Most of the study population wants to buy seafood that has not been pre-packaged or pre-marinated and they want to make this purchase in a grocery store as opposed to a seafood market.

For example, there is very little interest among the study population in buying seafood that is pre-marinated or pre-cooked— (83%) want to buy their seafood plain as opposed to pre-marinated (7%) or pre-cooked (7%).

Do you prefer to buy seafood plain in order to create your own recipe, pre-marinated or seasoned, or pre-cooked for you?

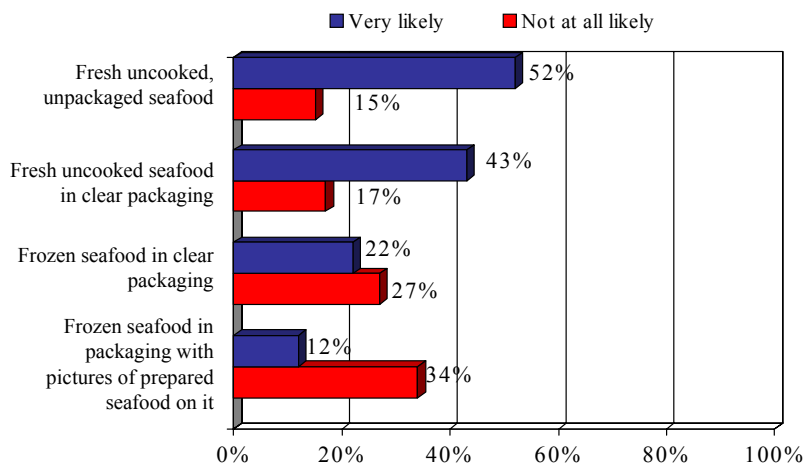


Q60

This tendency holds for Hispanics regardless of the market, country of origin, or other demographic factors.

Similarly, the study population is much more likely to purchase fresh seafood as opposed to frozen seafood. If they are going to purchase frozen seafood, they want it in clear plastic as opposed to in a bag or box with pictures on it.

How likely are you to purchase seafood that is packaged in the following ways?



Q61, 62, 63, 64

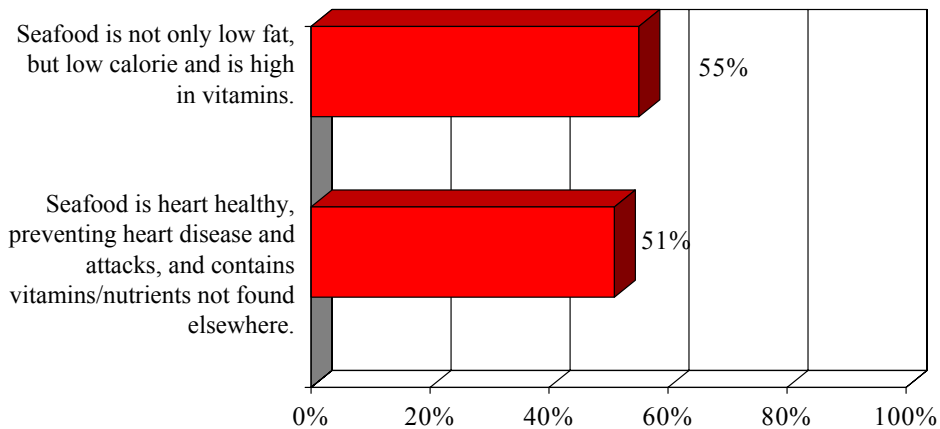
The tendency to prefer fresh seafood to frozen was true among Hispanics in the various markets, and was true regardless of other demographic factors. However, it should be noted that people over the age of 53 were more likely to consider purchasing frozen fish than those under the age of 53; almost one-third (32%) of people over the age of 53 say they are very likely to purchase seafood in clear packaging.

III. MESSAGE AND PROMOTION TESTING

The survey tested eight messages designed to increase seafood sales. Respondents were asked if each message made them much or somewhat more likely to purchase seafood, or whether it made no difference to them.

Of the messages tested, the two dealing with the health benefits of seafood are the most persuasive. It should be noted that health messages often test well in surveys for the food industry, yet do not always translate into changes in purchasing behavior. It is possible that people like to think of themselves as health conscious, yet end up making choices based more on taste preferences and perceived value and cost. Nevertheless, based on the percentage of chicken eaters who do so for health reasons, we should not ignore the role of health in a marketing campaign.

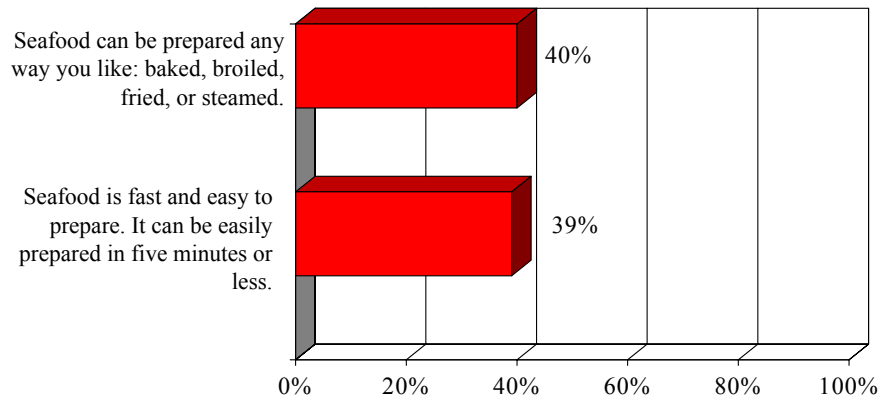
Do the following messages make you much more likely to purchase fish and other seafood?
(percent much more likely)



Q42, 41, 44, 43

Messages stress aspects of seafood preparation—it is fast and easy and it can be prepared a variety of different ways – also proved effective. This message tests almost as well as the health messages, and may therefore be an important component of the campaign.

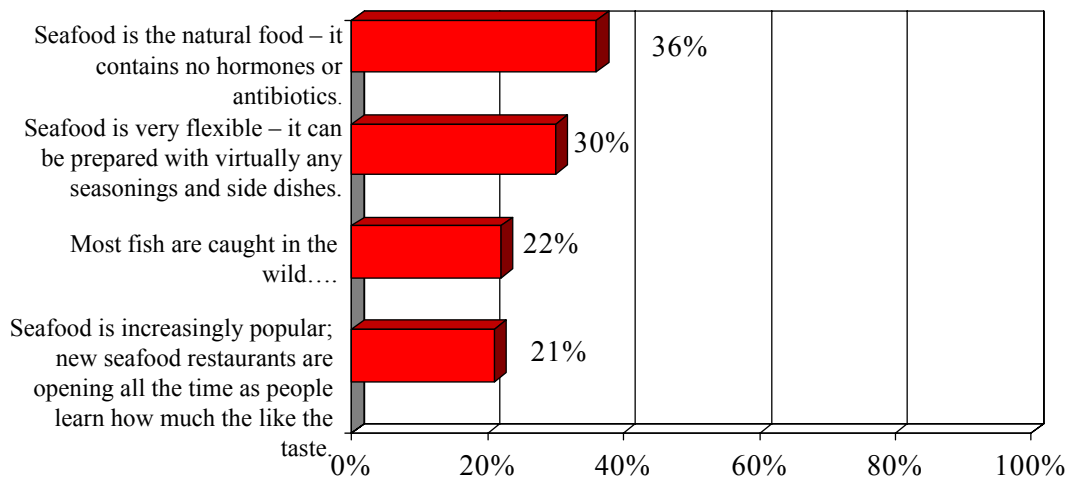
**Do the following messages make you much
more likely to purchase fish and other seafood?**
(percent much more likely)



Q42, 41, 44, 43

Other messages were less effective. These include messages focusing on such topics as seafood as a natural food, the flexibility in preparing side dishes, the fact that the majority of fish is caught in the wild, and seafood's growing popularity.

Do the following messages make you much more likely to purchase fish and other seafood? (Percent much more likely)



Q45, 48, 46, 47

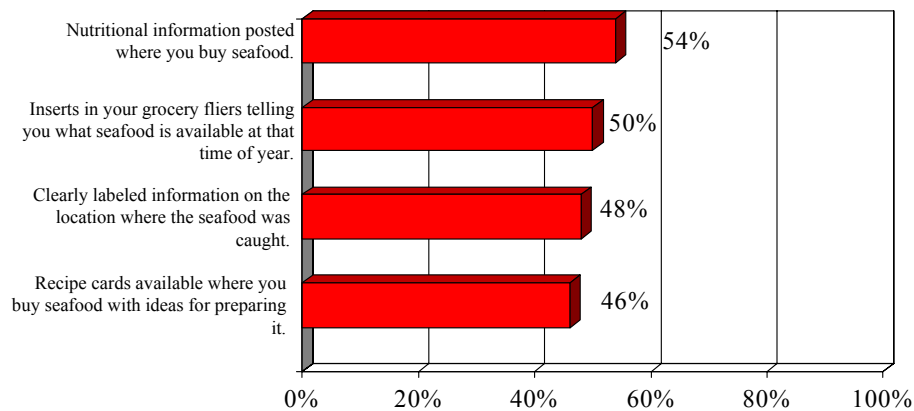
Earlier in the survey, we asked respondents how frequently they purchase seafood. For those who do not purchase seafood regularly, we asked why they did not purchase seafood more frequently. Combining these questions, we identified a target population. The target population reacts more favorably to all the messages than the overall population. 60% of the target population says the low fat, low calorie and high vitamin message makes them much more likely to purchase seafood.

Promotions Testing

The survey tested four possible ideas for increasing seafood sales. Respondents were asked if each idea made them much or somewhat more likely to purchase seafood, or if it didn't make a difference to them.

Approximately one-half of the study population says each of the ideas would make them much more likely to purchase seafood and approximately one-third says each idea would make no difference to them. Each of these ideas would be moderately effective; none on its own would substantially increase seafood consumption, but each would have some effect in the context of a larger campaign.

Would you be much more likely to buy seafood if these ideas were implemented?



Q51, 52, 50, 49

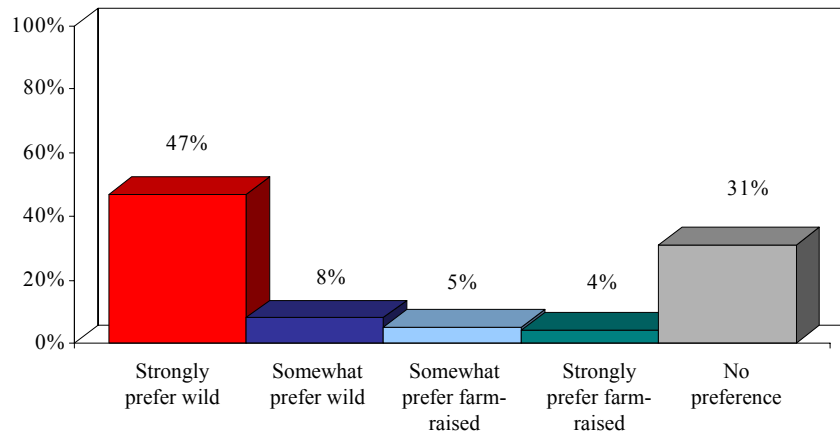
Posting nutritional information where seafood is bought is especially well received in the Los Angeles market—64% say it would make them much more likely to purchase seafood. This idea is also well received among those who say they are willing to try new types of seafood, 64% of whom say it would make them much more likely to purchase seafood, compared to 44% who are not likely to try new seafood. 56% of the target audience says it would make them much more likely to purchase seafood.

Labeling where seafood was caught is a more popular idea in the Boston market—61% much more likely to purchase. Again, those who say they are willing to try new types of seafood are more likely to be persuaded by this idea—56% compared to 35% who are not likely to try new types of seafood.

Potential Selling Points

The study population prefers seafood that is caught in the wild, but they are not especially concerned where in the wild it is caught. A majority (55%) of the population prefers seafood caught in the wild, 9% prefers farm raised and 31% has no preference.

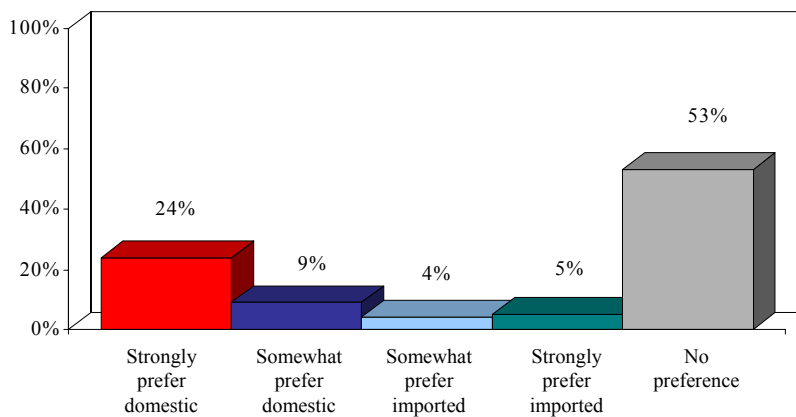
Do you prefer seafood that is caught in the in the wild, or farm-raised?



Q14

Most of the population (53%) is not concerned with seafood's country of origin, while one-third (33%) prefers domestic and 11% prefers imported.

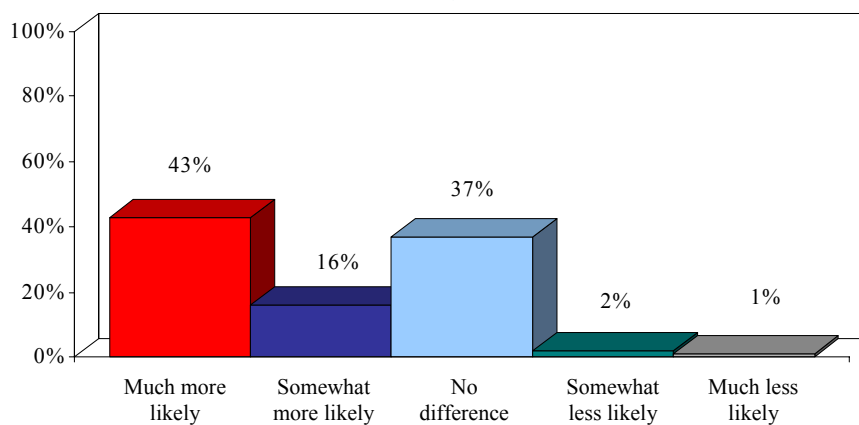
Do you prefer seafood that is caught in the United States or imported from another country?



Q13

People care about the origins of seafood only if they have been informed that the region is known for good seafood. A majority (59%) of Hispanics say that they would be more likely to buy seafood from regions known for high quality seafood – if they were informed about what those regions are. Given the lack of knowledge regarding seafood in general, however, it is unlikely that they currently have much knowledge on this particular topic.

Would you be more or less likely to buy seafood if
you were informed about which regions were
known for high quality seafood and the availability
to you?



Q53

Outside of the Miami market, the Florida brand name has little value in the seafood market. For example, 59% of Hispanics say that learning that seafood is from Florida makes no difference to them. Furthermore, very few in the study population (10%) have heard anything about Florida seafood.

IV. DEMOGRAPHICS

The chapter provides attitudinal and behavioral profiles of the six markets in the study, as well as examining differences by age, gender and income.

Boston

Hispanics in the Boston market are more diverse regarding their country of origin than the other markets included in the survey. While Hispanics in Los Angeles, Houston, Chicago, and Atlanta tend to be Mexican, and those in Miami tend to be Cuban, those in Boston comes from a variety of locations, including Puerto Rico, other Caribbean nations, as well as several South and Central American countries.

Hispanics in the Boston market are the most likely eat seafood on a regular basis. They are the most likely to say that seafood is either their first or second most frequently purchased meat (37%). Nearly half (47%) of Boston market respondents prepare seafood at home on a weekly basis—they are more likely than their counterparts in other markets to feel that seafood is easy to prepare. Hispanics living in Boston also tend to purchase a greater variety of seafood than in the other markets.

Seafood markets are more common in Boston than they are in other regions. Nearly one-third of Hispanics shop at seafood markets, more than any other market. Lobster is purchased more frequently in Boston than in the other markets—one-quarter of Boston respondents have purchased lobster in the past month. Reported purchases of salmon (12%) and crab (11%) are slightly higher in Boston than in other markets. Yellow fin tuna is the one type of seafood that is more common in other markets aside from Boston—nearly two-thirds (63%) of Boston respondents have not tried Yellow fin tuna.

Boston respondents react more favorable to the promotional idea of labeling seafood with the location of where it was caught.

Miami

Over half (57%) of the Hispanics living in Miami are from Cuba. For this reason, the traits of Hispanics living in Miami are same as those listing Cuba as their country of origin.

Respondents in the Miami market like the taste of seafood, but appear to view seafood as more of a high-end food than those in other markets. They are the most likely to give it an excellent rating on taste and health benefits, but they are also the most likely to say it is expensive. Seafood is the first or second most frequently purchased meat of 36% of Miami respondents, 39% prepare it at home on a weekly basis and 8% purchasing seafood weekly in restaurants.

Miami respondents have tried and purchase a much wider variety of seafood than respondents in the other markets – particularly those caught near Florida. Over 10% of Miami respondents have purchased shrimp (67%), lobster (20%), red snapper (14%), crab

(13%) and salmon (10%) in the past month. Miami respondents are much more likely to have tried snapper (98%), mahi-mahi (67%), grouper (91%) and tilapia (72%) than their counterparts in other markets.

Los Angeles

Most of the Hispanics living in the Los Angeles market are Mexican, although a few come from other Central and South American countries.

Respondents in the Los Angeles market purchase seafood (35%) and prepare it at home weekly (44%) at comparable rates as those in Boston and Miami, but their exposure to various types of seafood is lower. Los Angeles respondents are more likely to have never tried lobster (27%), stone crab (42%), snapper (42%), scallops (56%) and mackerel (71%).

Los Angeles respondents react more favorable than others to the promotional idea of posting nutritional information where seafood is sold. One-quarter of respondent report purchasing seafood in seafood markets as opposed to grocery stores. This is a higher number than in the other markets aside from Boston.

Houston

Respondents in the Houston market lack exposure to seafood. Shrimp (79%) is the only seafood which more than 7% of the population reports purchasing in the past month. A majority of Houston respondents have never tried scallops (68%), snapper (63%), swordfish (70%) and clams (51%).

Atlanta

Respondents in the Atlanta market are the most likely to say they prepare seafood at home weekly (53%) and that they purchase it at a restaurant weekly (25%). Thirty-one percent say seafood is either their first or second most frequently purchased meat.

Atlanta respondents lack knowledge and exposure to seafood. Only 13% say they are familiar with the seasonality of their preferred types of seafood. Shrimp (77%) is the only type of seafood that more than 8% of the study population reports having purchased in the last month. A majority has never tried scallops (67%), mahi-mahi (67%) and snapper (72%).

Chicago

Seafood is the least popular among the Chicago population. Seafood is the first or second most frequently purchased meat of just 22% of the population, 36% prepare it at home on a weekly basis and 8% order it at restaurants weekly.

These lower purchasing habits do not appear to be a function of less positive attitudes towards seafood. Chicago respondents are nearly as likely as other respondents to say seafood tastes good, is easy to prepare and is healthy. In fact, Chicago respondents are even a little less likely to say seafood is expensive. When asked why they don't purchase seafood more frequently, Chicago respondents are the most likely to say they just don't

think of it. Other factors suggest that seafood is less a part of the culture in Chicago than in other markets: only 12% purchase seafood in seafood markets; no more than 4% has purchased any type of seafood other than shrimp in the last month; Chicago respondents are among the most likely to have never tried all types of seafood.

Other Demographic factors

Age

Older respondents are more likely to eat seafood regularly and to view it positively. Older respondents are more likely than younger respondents to mention seafood as a food they purchase regularly. Older respondents are more likely to think seafood tastes good, is easy to prepare and is healthy. Older respondents are also more knowledgeable about seafood; 28% of those over 53 are familiar with the seasonality of seafood, compared to 12% of those under 27.

Most likely a function of lower knowledge levels, younger respondents react more favorably to a message emphasizing the heart healthy benefits of seafood.

Older respondents are much more likely to have tried all types of seafood than younger respondents. Younger respondents, however, express more willingness to try new types.

Gender

Women (37%) are more likely than (23%) men to say that seafood is their first or second most frequently purchased meat. Women are also more likely than men to prepare seafood at home, but men are more likely than women to order seafood at a restaurant. Opinions regarding taste, health benefits and price do not differ significantly by gender.

Women are more likely than men to say they have not tried most types of seafood and slightly less likely to say they are willing to try new types.

Income

Higher income respondents are more likely to say that seafood is their first or second most frequently purchased meat. Respondents with higher incomes are more likely to say they are familiar with the seasonality of seafood and to have tried more types of seafood than lower income respondents. Opinions regarding taste, health benefits and price do not differ significantly by income levels.

V. MESSAGES

In addition to the survey itself, an expert in Hispanic marketing developed a series of messages, based on his experience and the results of the survey. Each of these messages addresses a number of issues that were raised throughout the survey, and each are worded in such a way to translate easily in Spanish.

The first message is an attempt to play on the tendency to associate fish with special occasions, while still getting people to eat fish more often. If a substantial percentage of Hispanics could consider fish to be a food to be purchased on at least a weekly basis, it would greatly enhance seafood sales in this market.

"Remember back when everybody ate fish on Fridays? Dad would stop by the restaurant on the way home after payday and bring us the hot delicious fried fish. We loved it! And you know what? I now do it for my family. Fish on Fridays is a tradition around here"

The second message focuses on both the health benefits of fish, along with the ease of preparing fish and the variety available –all messages that tested well over the course of the survey.

"A lot of people I know have diabetes. So I am really watch what I eat. I eat more low fat, low calorie foods now like fresh fish. It's so good and so easy to prepare. And there are so many varieties of fish, lobster and shrimp, I never get bored. And I'm healthier!"

The third message focuses specifically on the dietary benefits of fish – while addressing the issue of price that proved so important in the survey.

"My husband loves his food. But he began gaining a little weight. So I started preparing fish for dinner twice a week. He noticed and loved it! Fish is low in calories and fat and not nearly as expensive as I thought. Best of all, he's back in his skinny pants."

The final message was an attempt to get people to view fish as more of a staple than as a special occasion food by focusing on the benefits that people already see in seafood - good taste and health benefits.

"Fish twice a week! That was my new year's resolution last January. I wanted to eat healthier and feel better. It turned out that keeping my resolution was easier than I thought because fish is so delicious. Fish twice a week. I feel good about myself".